

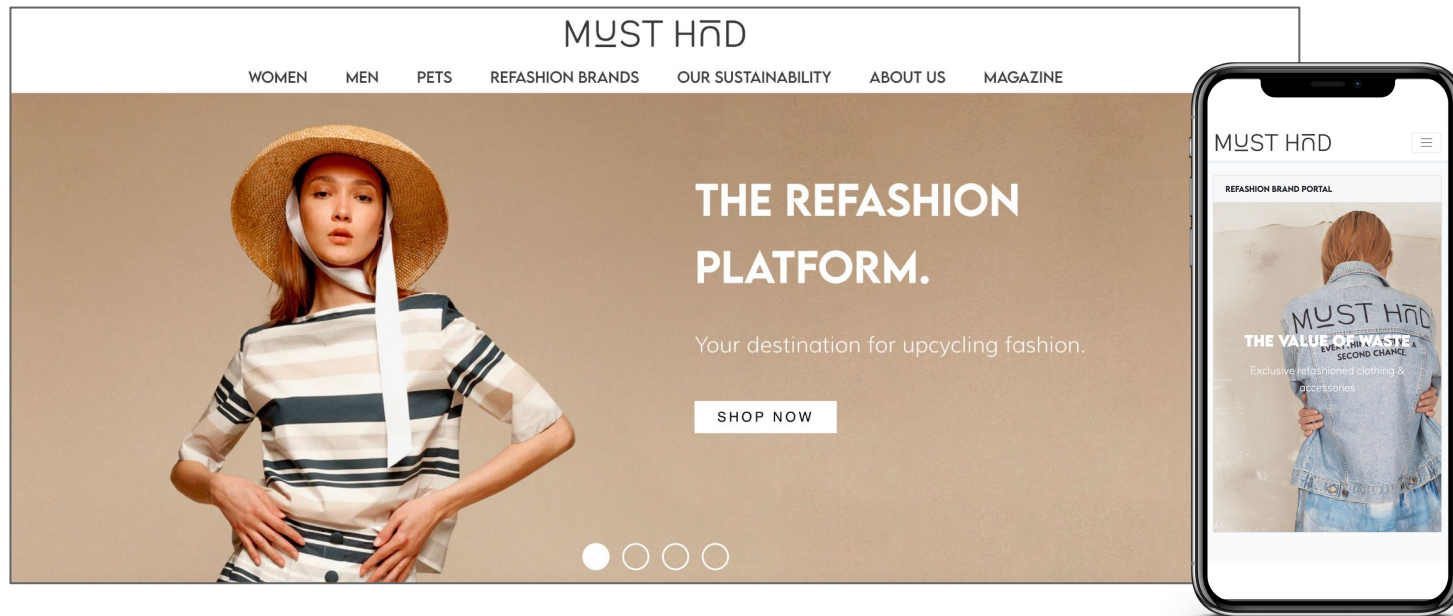


# MUST HAD

THE VALUE OF WASTE

Company presentation

Must Had is the first Italian platform exclusively dedicated to upcycling fashion.



Must Had Srl Società Benefit  
Startup innovativa  
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**LA STAMPA**  
**COSMOPOLITAN**

**ELLE**  
**LIFEGATE**

 **MAKERS VALLEY**  
**VOGUE**

**MUST HAD** FOSTERS THE  
TRANSITION TOWARDS  
**CIRCULARITY** BY EMPOWERING  
FASHION PLAYERS TO **REPURPOSE**  
TEXTILE WASTE INTO NEW  
PRODUCTS AND **SCALE** THEIR  
SUSTAINABLE BUSINESS.

MUST HAD



# We support fashion industry players by giving them access to the services they need to scale their circular businesses.

WHO?

## REFASHION BRANDS



Independent brands, artisans, designers and laboratories specialised in turning textile waste into new clothing and accessories.

*Online sales & distribution*

*Marketing & promotion*

*Production & operations*

*Offline distribution*

*Reporting & analytics*

HOW?

## WASTE SUPPLIERS



Textile manufacturers, stockists, fashion brands and other players interested in addressing their waste to circular destinations.

*Online & offline sales*

*Marketing & promotion*

*Operations*

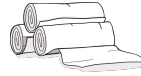


# Our platform limits the use of virgin materials by stimulating the supply of clothing and accessories exclusively produced from already existing materials.

## PRE-OWNED & DEADSTOCK CLOTHING



## LEFTOVER FABRICS



## GENERAL WASTE



# We offer flexible solutions to different fashion players regardless their dimension.

## REFASHION BRANDS

### Basic plan

€ 14,90 / mo

### Growth plan

€ 29,90 / mo

+ 20% flat commission on marketplace sales

- Dedicated brand page on musthad.com
- Shipment & logistics
- Must Had branded packaging
- Brand promotion
- Photo shooting
- Analytics

### **Basic plan** features plus:

- Waste material supply
- Must Had events
- Collaborations with influencers
- Account manager
- Access to Must Had partnerships

## WASTE SUPPLIERS

### Standard plan

€ 89,90 / mo

- Access to Must Had network of refashion brands
- Account manager
- Promotion
- Blockchain tool to show the origin of the materials
- Support to carbon credits generation

COMING SOON

COMING SOON

We commit to reduce the environmental impacts generated by the fashion industry, the 2nd most polluting industry in the world

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EVERY  
**5 MINUTES**  
**1 MILLION**  
PIECES OF  
CLOTHING IS  
PRODUCED

EVERY  
**SECOND**  
ONE FULL  
TRUCKLOAD OF  
TEXTILE GOES  
TO **LANDFILLS**

LESS THAN **1%**  
IS **RECYCLED**  
INTO **NEW**  
**CLOTHING**



# New revolutionary legislations are being introduced by the EU government to accelerate the circular transition.

2018



- **Introduction of the EPR** (Extended Producer Responsibility) in the European Union.
- **Producers are now responsible** for the treatment or disposal of post-consumer products, and have to disclose which circular solutions they plan to activate for their waste.

2022



- The French government has introduced **a new legislation prohibiting the destruction of unsold clothing** (other EU members are preparing the ground to implement the same)
- **The separate collection of textile waste has become mandatory** in Italy

2025



- **All the European Union members should introduce and implement these new laws** related to textile waste operations and management by 2025



**Our market of reference is growing at 9% CAGR, led by early-adopter customers and conscious brands launching upcycling collections.**



*Main trends*

**5 TRILLION \$**

is the estimated value of the Circular Fashion Tech industry within 2029 (*twice the size of fast fashion*)

**1.000%**

is the increase in upcycled products uploaded on Etsy marketplace in the last 5 years

**UPCYCLING ON CEO'S AGENDA**

Well-known fashion brands (e.g. Salvatore Ferragamo, Miu Miu, Pinko, Gucci and Levi's) have already launched an upcycled collection, and celebrities have started wearing upcycled pieces during important events (e.g. Billie Eilish at Met Gala)

# Today, our community is made up of 50 refashion brands that joined the initiative and helped us understand their real needs.

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## BUSINESS RESULTS ACHIEVED DURING THE FIRST YEAR

- Must had' community counts **45** Italian refashion brands and **5** European refashion brands engaged only organically
- Must Had has **5 active partnerships** with waste suppliers that supports Must Had's community with waste material supply
- From the its launch, the eCommerce platform registered **60K** sessions that have generated **28K€** of gross merchandise sales across Europe, USA and Asia.
- During Milan Fashion Week, Must Had private phygital event engaged more than **500 people**

**50**

refashion brands  
onboard

**5**

waste suppliers  
onboard

**1.500**

products uploaded on  
the platform

**€ 400K**


total gross  
merchandise value


# Our milestones.

2021


Among the 28 finalists of the Vogue Yoox Challenge. 

Accelerated by FTA and first capital raised. 

Featured in   

Collaboration with Fashion Revolution, broadcasted on main Italian television newscast. 

Speakers for the new Circular Fashion Management course of Bocconi University. 

Winner of the Green Award for \$25.000 in credits granted by Infobip at the Green Future Conference in Croatia. 

2022



We are a young and international team, driven by a disruptive thinking and strongly believing circular economy is the future.



**EUGENIO RIGANTI**  
CEO & Innovation Expert



**MATTEO AGHEMO**  
COO & Sustainability Expert



**ARIANNA LUPARIA**  
Creative Director & Fashion Expert



**ALESSANDRA GUFFANTI**  
Investor & Product Manager



**SERGIO FREGONI**  
Tech Advisor



**SILVIA PATONO**  
CTO



**THOI TRIEU NGO**  
Full Stack Developer



**SAKSHI TAPARIA**  
Marketing Manager



We are building relationships with key players in the fashion tech, refashion and sustainability ecosystem.

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Our mission generate direct impacts on 6 Sustainable development goals focusing on land, resources and economic growth.

## SUSTAINABLE DEVELOPMENT GOALS



**REFASHION  
IS ART**



**WASTE IS  
OUR  
CANVAS.**

**MUST HAD**